Avoiding the Team Member Face-Off

Guidelines for Working Effectively in Virtual Teams

Akisha Anthony
Izabela Solosi
CONTENTS

PROBLEM STATEMENT 4

Our Task 4
Top Challenges in Virtual Teams 4

LIMITATIONS & CONCERNS 5

LEARNER & CONTEXT ANALYSIS 5

Auditence 5
Data Sources 5
Interview & Survey Questions 6
Context Characteristics 8
Orienting Context 8
Instructional Context – Data source: prior teaching experience at client agency. 8
Transfer Context 9

TASK ANALYSIS 9

Analysis Methods 9

INSTRUCTIONAL OBJECTIVES 13

INSTRUCTIONAL APPROACH 15

INSTRUCTIONAL MATERIALS 25

PowerPoint Presentation and Instructor Notes 25
Participant Handout 25

EVALUATION 25

Formative 25
Summative 26
Confirmative 27
REFERENCES

APPENDIX A - PowerPoint Presentation and Instructor Notes

APPENDIX B - Participant Handout
PROBLEM STATEMENT

Technological advances minimize geographical barriers and have led to a major shift in the way people and teams work together. Telework and virtual teams are now commonplace. While there are many similarities between virtual and traditional teams, technology shifts team dynamics and presents added challenges to collaboration and performance.

The International Peace Consortium (IPC) maintains facilities around the US and in over 30 countries around the world, many in challenging political environments. The IPC staff support America’s diplomats and foreign staff in mitigating and resolving foreign policy conflicts. Due to being spread out geographically, most teams work in virtual environments. To fulfill the agency’s mission, teams must be able to collaborate on projects, share information in a timely manner, and organize the data in such a way that it is useful for their leadership to make critical decision in sometimes life-threatening situations.

According to a report by RW3, LLC, a provider of cross cultural training, there are many challenges to working in virtual teams. Ineffective communication, trust, decision-making and relationships are among the most common ones. Unresolved conflicts between team members in a traditional physical are bad enough, and are all the more dangerous in a virtual environment, where persons do not have the luxury of proximity to work out differences. When these elements of teamwork are in jeopardy, teams begin to breakdown.

Our Task

The IPC leadership has observed that the performance of employees who work in virtual teams are significantly poorer than face-to-face teams. The following is a training proposal aimed at improving the effectiveness of the IPC virtual teams. The training is to be designed and offered to 400 staff located at the Washington, DC headquarters.

For the purposes of this design, a virtual team is defined as a group of individuals who work across time, space and organizational boundaries. Team members interact primarily through electronic media such as teleconferencing, emails, instant messaging, and collaborative platforms. Teams can be within the same building or across the country or the world.

The training design will focus on providing participants with strategies on how to address four of the challenges identified as priority by our client: trust and rapport building, communication, and conflict resolution.

Top Challenges in Virtual Teams

Based on a survey of nearly 30,000 employees from multinational companies, it has been reported that the top challenges in virtual teams are:

- Inability to read non-verbal cues (94%)
- No time for relationship building (90%)
- Absence of collegiality (85%)
- Difficulty establishing rapport and trust (81%)
- Time zones (81%)
- Managing conflicts (73%)
- Decision-making (69%)
- Expressing opinion (64%)
- Language barriers (64%)
- Cultural Issues (59%)
- Technology itself (43%)

LIMITATIONS & CONCERNS

1. Limited access to employees and staff members, therefore the learner analysis was not as in depth as it should have been. Interviews were limited to the ombudsman.
2. The nature of the organization is one that requires pre-planning and scheduling, therefore due to time constraints and accelerated due dates, it was not possible to obtain appointments with key stakeholders and leadership.
3. The training must be conducted in the auditorium.
4. Employees from various sites must attend the training. Some learners will be attending online, and they will not be able to participate in the group activities.

LEARNER & CONTEXT ANALYSIS

Audience

The primary audience for this training includes employees, at all levels including leadership, located at the agency headquarters. Secondary audience may include employees at remote agency field offices around the nation and internationally that will be viewing a recording of the training.

Data Sources

The information will be primarily gathered through interviewing the following agency employees:

1. **One agency Ombudsman.** The agency Ombudsman is a designated neutral or impartial dispute resolution practitioner whose major function is to provide independent, impartial, confidential and informal assistance to managers and employees, clients and/or other stakeholders. He or she provides options for people with concerns, who seek to bring their concerns forward safely and effectively. Services provided include coaching on management issues, facilitating conflict resolution processes, enabling safe upward feedback, and assisting those who feel harassed and discriminated against. Another important part of the ombudsman’s responsibilities is tracking trends based on the cases they manage. The reason we selected to interview the Ombudsman is because they have access to data on the whole organization and are familiar, among other things, with issues managers and employees face when working in virtual teams.

2. **Two virtual team managers and team leaders**

3. **Three virtual team members**

A secondary means of gathering information will be an online survey to be sent out to all 400 employees.

<table>
<thead>
<tr>
<th>CATEGORY</th>
<th>DATA SOURCES</th>
<th>CHARACTERISTIC</th>
</tr>
</thead>
<tbody>
<tr>
<td>ENTRY BEHAVIORS</td>
<td>Employee survey</td>
<td>Based on survey results,</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• 75% of the survey participants work in virtual teams 50% of the time;</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• 15% work in virtual teams 90-100% of the time, and</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• 10% work in virtual teams 10-25% of the time.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Most participants described their comfort with technology as “intermediate”.</td>
</tr>
</tbody>
</table>
**Avoiding the Team Member Face-Off | 6**

<table>
<thead>
<tr>
<th>PRIOR KNOWLEDGE OF TOPIC AREA</th>
<th>Employee survey</th>
<th>All employees have access to short webinars and presentations on the topic, but there has been no formal agency wide training. This suggests participants will be coming in with various levels of knowledge and practical experience.</th>
</tr>
</thead>
</table>
| ATTITUDES TOWARD CONTENT AND POTENTIAL DELIVERY SYSTEM | Employee survey Prior teaching experience at client agency | Staff and management recognize that:  
  - The training is necessary to enhance collaboration and support the agency’s mission  
  - The training will benefit their ability to perform effectively and complete assigned tasks. |
| MOTIVATION | Employee survey | Improved performance |
| EDUCATION AND ABILITY | Research | ICP Employees are required to possess, at a minimum, a BA. |
| LEARNING PREFERENCES | Interview agency ombudsman Employee survey Prior teaching experience at client agency | Employees would like:  
  - Performance support tools such as step-by-step guides  
  - The opportunity to practice skills and receive feedback |
| GROUP CHARACTERISTICS | Research Demographics survey | Employees of IPC are spread across five generations in the workplace (Traditionalists, Baby Boomers, Gen X, Millennials and Gen Z.). This characteristic implies various learning styles, comfort with technology, communication styles and experience in the workplace.  
Staff is culturally diverse. |

---

**Interview & Survey Questions**

**Interview questions for the Agency Ombudsman:**

- What challenges/trends have you observed employees having when working in virtual teams?
- What percentage of personnel attending the training are managers?
- What is the age range of the participants?
- What percentage of the participants will be present in person and what percentage will be attending online?
- What is the estimated percentage breakdown of seniority – employees who have worked for the agency less than 5 years, between 5-15 years, more than 15 years?
- What specific scenarios, if any, would you like us to focus on?
- What three tools/skills should participants walk away with at the end of the training?
- What types of accommodations, if any, might be needed?

**Interview Questions for Managers and Team Leaders:**

- What are 3 challenges to managing a virtual team?
- What skills/tools would help you manage your team better?
What skills/tools would the members need to participate better?

**Interview Questions for Team Members:**

- What are 3 challenges to participating in a virtual team?
- What skills/tools would help you participate better?

**Employee survey questions:**

- How often do you work in virtual teams?
- On a scale of 1–3 (1=not at all, 2=somewhat comfortable, 3=very comfortable) how comfortable do you feel using the technology required to working in virtual teams?
- What is the biggest benefit to team performance when working in virtual teams?
- What is the biggest barrier to team performance when working in virtual teams?
- What strategies/tools/skills would make you more comfortable working in virtual teams?
- Which of the following training approaches would you find most useful in a training designed to teach skills on how to work effectively in virtual teams? Please rate each in order of preference.
  - PowerPoint presentation
  - Handouts
  - Case studies
  - Online micro-learning sessions
  - Group discussion
  - One-on-one mentoring/coaching
  - Other ___________________________

- In your experience, how does technology impact trust and relationship building?
- In your experience, how does technology impact communication?
- What conflict resolution methods have you used or have you seen used when issues arose in virtual teams?
- When working on a project in a virtual team, how often have you observed conflict arising?
  - very often (every meeting)
  - Often (every few meetings)
  - Sometimes (every few months)
  - Rarely (1-3 times during the duration of the project)
  - Never

- Learning how to effectively work in virtual teams is:
  - Valuable
  - Somewhat valuable
  - Not valuable
  - A total waste of time

- On a scale of 1-3 (1=not at all, 2= somewhat, 3=very) how relevant is this topic to your job?
Context Characteristics

Training Location: Main agency headquarters.

Access: Participants will be able to attend in person or virtually as the session will be transmitted live. Those who wish to revisit the training or did not have the opportunity to attend it live will be able to access a video recording.

Orienting Context

<table>
<thead>
<tr>
<th>CATEGORY</th>
<th>DATA SOURCES</th>
<th>CHARACTERISTIC</th>
</tr>
</thead>
<tbody>
<tr>
<td>GOALS</td>
<td>Employee survey</td>
<td>Obtain knowledge/skills/tools that will enable effective trust building, communication, decision-making and conflict management when working in virtual teams.</td>
</tr>
<tr>
<td>TOPIC RELEVANCY TO JOB</td>
<td>Employee survey</td>
<td>High</td>
</tr>
</tbody>
</table>

Instructional Context - Data source: prior teaching experience at client agency.

<table>
<thead>
<tr>
<th>CATEGORY</th>
<th>CONSIDERATIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>LIGHTING</td>
<td>Lighting will be focus on the stage, on the trainers. The light in the rest of the auditorium will be turned down, making it challenging to read the participants body language and see when they have questions.</td>
</tr>
<tr>
<td>NOISE</td>
<td>Noise levels are minimal.</td>
</tr>
<tr>
<td>TEMPERATURE</td>
<td>Temperature is cold during the summer. Trainer and participants should dress in layers.</td>
</tr>
<tr>
<td>SEATING</td>
<td>Auditorium style, rows of chairs. Challenging for participants to move around or work in small groups outside of the people directly around them. This requirement was set by the client and is not open to change.</td>
</tr>
<tr>
<td>ACCOMODATIONS</td>
<td>A sign language interpreter will be interpreting in real-time. Any videos or sound clips will need captions. Two agency employees from the ombudsman’s office will be on hand to assist the trainers by fielding questions from the online participants.</td>
</tr>
<tr>
<td>EQUIPMENT</td>
<td>Screen, projector, clicker and sound are available. Any slides must be submitted in advance to be approved and loaded on the agency laptop. Because it is recorded, the trainers must be aware of where the on-stage microphones are mounted in the ceiling and keep in range and facing them at all times. Any questions from the participants will be repeated by the trainer to ensure those watching remotely are able to hear them.</td>
</tr>
<tr>
<td>ATTENDANCE</td>
<td>The program is made available agency wide. Typically, 300-400 participants register to participate, either in person or remotely. Over 75% will join in person.</td>
</tr>
<tr>
<td>SCHEDULING</td>
<td>The training will be provided as 10 individual full day session throughout the months of October and November to accommodate the number of participants registered. Each session will be capped at 30 students, with no more than 10 students online.</td>
</tr>
</tbody>
</table>
Transfer Context

<table>
<thead>
<tr>
<th>CATEGORY</th>
<th>DATA SOURCES</th>
<th>CHARACTERISTIC</th>
</tr>
</thead>
<tbody>
<tr>
<td>MANAGERIAL SUPPORT</td>
<td>Interview with ombudsman</td>
<td>Management understands the importance of supporting employees as they apply new skills and will provide assistance as necessary.</td>
</tr>
<tr>
<td>OPPORTUNITIES TO USE SKILLS</td>
<td>Employee survey</td>
<td>In day-to-day task, long and short term projects.</td>
</tr>
</tbody>
</table>

**TASK ANALYSIS**

Analysis Methods

To ensure the problem is understood as completely as possible, the following approaches were chosen:

1. **Topic Analysis**
   a) Breaking down the content into its most basic elements ensured that the information presented to the audience is directly related to solving the issues identified in the problem statement. Furthermore, narrowing down the scope led to the selection of content that will yield the best results.
   b) The topic analysis was used to inform the questions used in interviewing the SMEs as part of the critical incident analysis.
   c) Research of existing literature assisted in the identification of the factors that cause virtual teams to have poor performance. Interviews with individuals who have worked in virtual teams provided firsthand accounts of their experience and enhanced the data gathered through research.
   d) Identifying and analyzing the business need resulted in a clear understanding of how the audience might be convinced to adopt a different mindset towards the working with other persons who are geographically dispersed to achieve a common goal.

2. **Critical Incident Analysis**
   a) The critical incident analysis “provided a rich context for analyzing interpersonal skills” (Morrison, pg. 87) – in this case the focus is on trust, communication, decision-making and conflict resolution.
   b) Two parts:
      - Interviews with SMEs (2) – Interviews highlighted best practices and red flags around developing trust and rapport, building relationships, making decisions, communicating effectively and resolving conflict. Sample questions:
         1. Describe three times working in virtual teams went well.
         2. Describe three times working in virtual teams did not go well.
         3. What warning signs should one watch for that would indicate things not going well?
         4. What strategies did you use to build trust?
         5. What strategies did you use to communicate effectively?
         6. What strategies did you use to manage and resolve conflict?
Critical Incident Analysis

Two SMEs were interviewed as part of the Critical Incident Analysis – Tracey Cairnie, President of CoreVision, LLC and Julia Morelli, Director of Operations of GMU Instructional Foundation. Ms. Cairnie provides coaching to leaders and members of virtual teams and has been in both roles in her previous work. Ms. Morelli manages a virtual team composed of one staff remote full-time, one staff remote part-time and several staff remote occasionally. The SMEs identified the following behaviors that contributed either to the success or demise of performance in virtual teams:

Behaviors that lead to success:

- Be intentional in your communication
- Plan ahead - preparation is 80% of the key to success
- Be curious
- Don't jump to conclusions
- Define goals, expectations, roles, how the team will work together up-front
- Reflect on how things are going, what can be improved
- Acknowledge successes along the way
- Check your assumptions and perceptions
Avoiding the Team Member Face-Off

- Meet in person at least once if at all possible
- Make interactions predictable
- Do not avoid conflicts, keep communication open
- Be consistent
- Ensure everyone knows how to use the technology
- Build in multiple channels of communication
- Assume best intent

Behaviors that lead to breakdowns in trust and communication and give rise to conflict:
- Not speaking up when you have concerns
- Not being transparent
- Not clarifying
- Using email when not appropriate

Topic Analysis Detailed

<table>
<thead>
<tr>
<th>CONTENT</th>
<th>REFERENCES</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Teams</strong></td>
<td>▼ Learner analysis</td>
</tr>
<tr>
<td>1. Definition</td>
<td>▼ Research</td>
</tr>
<tr>
<td><strong>Team Life Cycle</strong></td>
<td></td>
</tr>
<tr>
<td>1. Forming</td>
<td></td>
</tr>
<tr>
<td>2. Storming</td>
<td></td>
</tr>
<tr>
<td>3. Norming</td>
<td></td>
</tr>
<tr>
<td>4. Performing</td>
<td></td>
</tr>
<tr>
<td><strong>Definition</strong></td>
<td></td>
</tr>
<tr>
<td>1. What makes trust</td>
<td></td>
</tr>
<tr>
<td>▶ Face2Face vs. Virtual Environment</td>
<td></td>
</tr>
<tr>
<td>▶ Team Lead vs. Team Member</td>
<td></td>
</tr>
<tr>
<td>2. What breaks trust</td>
<td></td>
</tr>
<tr>
<td>▶ Face2Face vs. Virtual Environment</td>
<td></td>
</tr>
<tr>
<td>▶ Team Lead vs. Team Member</td>
<td></td>
</tr>
<tr>
<td><strong>Creating a Safe Space</strong></td>
<td></td>
</tr>
<tr>
<td>1. Defining what is a safe space</td>
<td></td>
</tr>
<tr>
<td>2. Build Rapport</td>
<td></td>
</tr>
<tr>
<td>▶ Icebreakers</td>
<td></td>
</tr>
<tr>
<td>▶ Virtual Watercooler</td>
<td></td>
</tr>
<tr>
<td>▶ Maintaining Rapport – Take 5</td>
<td></td>
</tr>
<tr>
<td>3. Establish Group Norms</td>
<td></td>
</tr>
<tr>
<td>▶ Clarify Goals</td>
<td></td>
</tr>
<tr>
<td>▶ Roles and Responsibilities</td>
<td></td>
</tr>
</tbody>
</table>
- Convener
- Team Leader
- Meeting Facilitator
- Note Taker
- Time Keeper

**Communication**
- Channels
- Frequency
- Confidentiality
  - What is reported back and how?
  - What can be said outside the group?

**Conflict Resolution Process**
- How to bring concerns
- Who is tie breaker

**Decision-Making**
- Models
  - Command
  - Consult
  - Vote
  - Consensus
- Select Model
  - Consider pros and cons of each model
- Transparency

**Accountability**
- Who will hold who accountable?
- How will we hold each other accountable?
- Giving and receiving feedback
  - Timing
  - Location

**Types**
1. Verbal
2. Non-verbal
3. Para-verbal

**Meeting Environment**
1. Types
   - VTC
   - Conference Call
   - Asynchronous (Email)
2. Selecting an environment
   - Benefits of each type
   - Downsides of each type
   - Technology needed

**Skills**
- Characteristics of good vs. poor communication
- Identify impact of technology
- Strategies
  - Email Etiquette
  - Active Listening

- Build in multiple channels of communication
- Not being transparent
- Be consistent
### INSTRUCTIONAL OBJECTIVES

The goal of this program is to support IPC employees at all levels with the knowledge, skills and tools that will enable them to effectively participate in virtual teams.

**Domain:** The learning objectives were developed based on the cognitive domain because they relate to “information and knowledge, naming, solving, predicting and other intellectual aspects of learning” (Morrison, p. 103). As per Bloom’s taxonomy, the objectives include both simple recall of information as well as intellectual activities, focusing on higher intellectual levels.

<table>
<thead>
<tr>
<th>Topic</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>▶ Summarizing</td>
<td></td>
</tr>
<tr>
<td>▶ Asking Questions</td>
<td>Types: open-ended, closed-ended, clarifying</td>
</tr>
<tr>
<td>▶ Communication patterns that interfere with connection</td>
<td></td>
</tr>
<tr>
<td>▶ Communication that opens or closes dialogue.</td>
<td></td>
</tr>
<tr>
<td>▶ Facilitating Virtual Team Meetings</td>
<td>Creating an agenda</td>
</tr>
<tr>
<td>▶ Facilitating communication</td>
<td></td>
</tr>
<tr>
<td>▶ Managing participation</td>
<td></td>
</tr>
<tr>
<td>▶ Dealing with difficult team members</td>
<td></td>
</tr>
<tr>
<td><strong>Warning Signs:</strong> withdrawal, frustration, sarcasm, cynicism</td>
<td></td>
</tr>
<tr>
<td><strong>Sources of Conflict</strong></td>
<td></td>
</tr>
<tr>
<td>1. Define: Data, Values, Relationships, Structural, Resources, Goals, Technology itself</td>
<td></td>
</tr>
<tr>
<td>2. Strategies to address each source of conflict</td>
<td></td>
</tr>
<tr>
<td>3. Perception</td>
<td>Facts vs. Stories</td>
</tr>
<tr>
<td>▶ Tools</td>
<td>Ladder of Inference</td>
</tr>
<tr>
<td></td>
<td>Judger/Learner Mindset</td>
</tr>
<tr>
<td>▶ Strategy: Speaking from your own perspective</td>
<td>Not assigning blame</td>
</tr>
<tr>
<td></td>
<td>Identifying needs</td>
</tr>
<tr>
<td></td>
<td>Making requests</td>
</tr>
<tr>
<td><strong>Conflict Styles</strong></td>
<td></td>
</tr>
<tr>
<td>1. Define: Accommodate, Avoid, Compete, Collaborate, Compromise</td>
<td></td>
</tr>
<tr>
<td>2. Benefits and downsides of each style</td>
<td></td>
</tr>
<tr>
<td>3. Impact of dynamics between different styles on resolution</td>
<td></td>
</tr>
<tr>
<td><strong>Skills</strong></td>
<td></td>
</tr>
<tr>
<td>1. Use of effective communication skills</td>
<td></td>
</tr>
<tr>
<td>2. Create a mutual-problem solving statement</td>
<td></td>
</tr>
<tr>
<td>3. Refocus</td>
<td></td>
</tr>
<tr>
<td>4. Separate the people from the problem</td>
<td></td>
</tr>
<tr>
<td><strong>Learner analysis</strong> – ombudsman interview and employee survey</td>
<td></td>
</tr>
<tr>
<td><strong>Critical incident analysis results:</strong></td>
<td></td>
</tr>
<tr>
<td>o Not speaking up when you have concerns</td>
<td></td>
</tr>
<tr>
<td>o Not clarifying</td>
<td></td>
</tr>
<tr>
<td>o Do not avoid conflicts, keep communication open</td>
<td></td>
</tr>
<tr>
<td>o Assume best intent</td>
<td></td>
</tr>
<tr>
<td>o Be curious</td>
<td></td>
</tr>
<tr>
<td>o Don’t jump to conclusions</td>
<td></td>
</tr>
<tr>
<td>o Reflect on how things are going, what can be improved</td>
<td></td>
</tr>
<tr>
<td>o Acknowledge successes along the way</td>
<td></td>
</tr>
<tr>
<td>o Check your assumptions and perceptions</td>
<td></td>
</tr>
</tbody>
</table>
EDIT 705 – B01

Avoiding the Team Member Face-Off | 14

**TASK ANALYSIS**
(Outline)

**UNDERSTANDING GROUP DYNAMICS**
- Team: Definition, types of teams
- Team Life Cycle

**BUILDING TRUST & RAPPORT**
- What makes/breaks trust
- Creating a safe space: building rapport, establishing group norms

**COMMUNICATING TO ACHIEVE RESULTS**
- Types
- Selecting the appropriate meeting environment
- Skills: active listening, summarizing, asking questions, speaking from your own perspective

**MANAGING AND RESOLVING CONFLICT**
- Warning signs
- Sources of conflict: definitions, strategies, tools
- Conflict Styles: definitions, characteristics, dynamics
- Skills: use of effective communication skills, creating a mutual problem-solving statement, refocus, separate the people from the problem

**LEARNING OBJECTIVES**
(You will be able to...)

**UNDERSTANDING GROUP DYNAMICS**
- Assess the type of team the participant is engaged in to inform appropriate strategies for building trust and rapport, communication, and managing and resolving conflict
- Explain how teams move through the life cycle process

**BUILDING TRUST & RAPPORT**
- Evaluate each stage of the team life cycle and identify opportunities to create trust and build rapport
- Compare and contrast behaviors that build and break trust
- Analyze the elements of a safe space and develop group norms for the case study provided

**COMMUNICATING TO ACHIEVE RESULTS**
- Assess the appropriateness of each communication type and meeting environment, determine the best option and argue your selection for the case study provided
- Develop strategies to break down communication barriers
- Apply effective communication skills to build trust and develop more collaborative working relationships
- Analyze communication strategies and select the best approach to achieve desired results

**MANAGING AND RESOLVING CONFLICT**
- Identify warning signs that indicate the potential for conflict
- Determine the sources of conflict in the provided case study and select the appropriate response that will resolve the conflict
- Assess the benefits and disadvantages of each style of conflict and the impact dynamics between different styles has on conflict resolution
- Explain perception as a source of conflict
- Analyze the usefulness of the Ladder of Inference and Learner/Judger Mindset in addressing conflict
- Demonstrate effective conflict resolution skills and determine appropriate strategies to resolve the conflict in the provided case study
INSTRUCTIONAL APPROACH

Total time: One day – 8 hours

Notes: The session will be presented live and in person. Participants will be present in the room physically or remotely via VTC. The number of participants in the session will be 30-40, with no more than 10 participants online. Online participants will act as observers to small group activities.

Sequencing models: The instructional approach is based on a mixture of sequencing strategies, namely the four schemas of concept-related sequencing and Elaboration Theory, specifically content expertise as “conceptual sequence arranges concepts according to their superordinate, coordinate, and subordinate relationships.” (Morrison, p. 130). Our task analysis logically groups similar content, starts with general concepts and then goes in depth to further analyze each component. Then drawing from real-world scenarios the instructions create a connection with learner, and finally group activities helps the learners identify and implement the appropriate behaviors and concepts learned during the training. From content expertise sequencing perspective, the high-level learner outcome (instructional objective) is to assist personnel working in virtual teams not only improve team performance, but learn how to be an overall effective and productive member of a team. Therefore, the learner must master the concepts and principles of team dynamics.

Technology requirements: VTC for online participants, laptop with projector, microphone, speakers, clicker.

<table>
<thead>
<tr>
<th>MODULE &amp; INSTRUCTIONAL OBJECTIVES</th>
<th>INSTRUCTIONAL APPROACHES AND STRATEGIES</th>
<th>INSTRUCTIONAL MATERIALS</th>
<th>TIME</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Participants introduce themselves, how often they work in virtual teams and what their favorite software or technology is.</td>
<td>Flip chart, markers, tape to record group norms and post where visible by all</td>
<td></td>
</tr>
<tr>
<td>SESSION GOAL</td>
<td>Instructors explain the goal of the session, agenda and housekeeping items (breaks, facilities for those in the room, etc.). Establish group norms with the assistance of the participants: speak one at a time, be respectful of other’s opinions, limit interruptions (cell phones on silent/vibrate, take calls outside if necessary), participation expectations, the right to pass, anything else participants might offer.</td>
<td>Participant Handout with PowerPoint information, handouts, and activities</td>
<td></td>
</tr>
<tr>
<td>GROUP NORMS</td>
<td>Participants take a few minutes to reflect on their last experience of working in virtual teams and write down the following:</td>
<td>The Eight Characteristics of High-Performing Virtual Teams Handout</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• What went well?</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• What went wrong?</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### MODULE 1. UNDERSTANDING TEAM DYNAMICS

- **Explain** how teams move through the life cycle.

<table>
<thead>
<tr>
<th>Activity</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Instructors facilitate a conversation around:</td>
<td>How is the definition of a virtual team? What different types of teams can there be?</td>
</tr>
<tr>
<td>Instructors introduce the Team Life Cycle model and discuss opportunities and challenges at each stage. Emphasize that teams go through the cycle multiple times depending on the circumstances and it does not have to be a linear progression.</td>
<td>Participants use the experience they identified in the introduction to do the following: Identify how many times their team went through the cycle, Strengths of the team at each stage, Weaknesses of the team at each stage.</td>
</tr>
</tbody>
</table>

### MODULE 2. BUILDING TRUST AND RAPPORT

- **Evaluate** each stage of the team life cycle and identify opportunities to create trust.
- **Compare and contrast** behaviors that build and break trust.
- **Analyze** the elements of a safe space and develop group norms for the

<table>
<thead>
<tr>
<th>Activity</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Building Trust and Rapport</strong></td>
<td>Instructors introduce the concept that 80% of success is preparation and planning. Building trust and rapport rely heavily on both.</td>
</tr>
<tr>
<td>Instructors break participants off into small groups of 4-5 and ask each group to brainstorm around:</td>
<td>What behaviors build trust in face-to-face environments? How does the virtual environment change the way trust is built?</td>
</tr>
<tr>
<td>Instructors introduce the concept that 80% of success is preparation and planning. Building trust and rapport rely heavily on both.</td>
<td>What damages trust from a team leader perspective? What damages trust from a team member perspective?</td>
</tr>
<tr>
<td>Once brainstorm is completed, each group will be asked to provide one behavior for each of the following categories (facilitators record answers on flip chart):</td>
<td>Behavior that builds trust in a: Team leader, Team member</td>
</tr>
<tr>
<td>Behavior that damages trust in a:</td>
<td></td>
</tr>
</tbody>
</table>

---

**Instructor PowerPoint**  
**Participant Handout with PowerPoint information, handouts, and activities**  
**30 Mins.**

**Flip chart, markers, tape to record group norms and post where visible by all**  
**Instructor PowerPoint**  
**Participant Handout with PowerPoint information, handouts, and activities**  
**Observer sheets that detail what the observers should look for**  
**2 Hrs.**
Avoiding the Team Member Face-Off

Instructors point out common themes among the answers provided. Some predicted answers are clear communication, transparency, involvement in decision-making, accountability, reliability. Ask the group how these behaviors impact performance (instructors record answers.) and to compare with their answer to the question “In an ideal world, what would an effective, performing virtual team look like?” Ask participants to share examples.

**Creating a Safe Space**

Instructors introduce the concept of a “Safe Space”. Facilitate discussion around why a safe space is important and what it looks like. Introduce elements:

- **Building rapport** – ask participants to recall the icebreaker at the beginning of the session and analyze how effective it was in creating rapport. What would they have done differently? Instructors note the importance of bringing people together, if possible, at least once throughout the duration of the project.
  - Instructors introduce additional rapport building strategies and discuss pros, cons, when and how to use: virtual water cooler – how to set up and use; taking 5 minutes at the beginning of meetings to check-in, allow for venting if necessary, ensure everyone is present.
- **Establish group norms** – ask participants to recall the instructors establishing group norms at the beginning of the session. Ask participants to evaluate and share the effect it had on them going through the process? What elements were included?
  - Clarifying goals – point out instructors clarified session goals upfront and invited questions for clarification. Why is this important?
  - **Roles and Responsibilities** – instructors ask participants to generate what roles would team members fulfill and what would the responsibilities of each role be? Identify Convener, Team Leader, Meeting Facilitator, Note Taker, Time Keeper and others if appropriate.
  - **Communication** – ask participants to identify different channels of communication. Emphasize it is important that all team members need to understand how to use the technology (opportunity to build rapport by helping each other out) and what channels of communication will be used and in what circumstances (meetings, outside meeting communication, file transfer, etc.). Introduce the concept of confidentiality (i.e. what and how will the team leader report back, if applicable; what and how will the team members be able to discuss with outsiders?)
  - **Conflict Resolution Process** – ask reflect on the situation they identified at the beginning of the session and analyze what the conflict resolution process was in their context. Was it effective? Why or why not? Why is it important in the context of creating a “safe space”? What elements...
Decision-making – instructors introduce the four different types of decision-making: command, consult, vote, and consensus. Participants are asked to break up in groups of 3–5. Each group is assigned a decision-making model to analyze and determine pros, cons, and when it is appropriate. Each group is asked to share their findings. Each participant is asked to look back at their initial scenario and identify the decision-making model used, how it was selected and by whom, whether it was appropriate or not, and its effectiveness. Why is transparency in decision-making important?

Accountability – defined accountability: who will hold whom accountable, in what way? It is important that team members hold each other accountable and do so consistently. Strategies: at the end of each meeting document who does what and by when; after the meeting, send notes clearly identifying deadlines, action items, and assigned responsibilities to all team members. Consider putting deadlines on a shared calendar and set reminders.

All of the participants present, in-person are divided into small groups of 4–6. Half of the groups will look at a long term, established team scenario. Their group’s objective is to manage the upcoming office move into another building. The office move is expected to happen in two years. The other half of the participants will look at a short term, 2 meeting scenario. Their group’s objective is to award the contract to build the new office space. The contract must be awarded in 10 business days. All of the groups are tasked to develop group norms as to how they will work during their allotted time. Online participants will observe the interactions and track how the groups move through the process – what goes well, challenges, missed opportunities. Debrief:

- Each group documents their group norms on chart paper and posts it on the walls. Participants are asked to take a few minutes to read what each group came up with.
- Debrief questions:
  - What do you notice?
  - What are the differences in establishing group norms when you have long term vs. short term projects?
  - What was easy about this exercise?
  - What was challenging?
  - What informed the group’s decisions as to what elements to include or not to include in the group norms?
Module Closing:
Participants use the experience they identified to individually reflect on the following:

- Team members respect group norms and when they are unclear about what’s okay and not okay, they ask for clarification.
  5=always, 4=often, 3=sometimes, 2=rarely, 1=never
- Team members communicated clearly.
  5=always, 4=often, 3=sometimes, 2=rarely, 1=never
- Team members understood the decision-making process.
  5=always, 4=often, 3=sometimes, 2=rarely, 1=never
- Team members were involved in the decision-making process.
  5=always, 4=often, 3=sometimes, 2=rarely, 1=never
- Team members owned their mistakes, apologized, and made amends. They do not blame each other for their mistakes and hold each other accountable with honesty and respect.
  5=always, 4=often, 3=sometimes, 2=rarely, 1=never
- Team members do what they say they do. They are aware of their competencies and limitations. They do not over promise and are able to deliver on commitments and balance competing priorities.
  5=always, 4=often, 3=sometimes, 2=rarely, 1=never
- Based on their answers to the questions above, how much did team members trust each other? What were missed opportunities to increase trust and rapport? Share as a big group.

How Individuals Communicate
Instructors ask participants to think back to the initial situation they identified answers to the closing survey of the previous module. What do they notice about communication? Instructors introduce the different types of communication: verbal, non-verbal, and para-verbal and facilitate discussion.

Meeting Environments
Instructors break participants to break into small groups, assign each group a type of meeting environment and ask them to analyze the benefits and downsides in relation to the different types of communication, and the technology needs of each environment. Online participants will do the same with a meeting environment of their choice. All groups and online participants will report out at the end of the session. Instructors introduce their own list and compare with participant responses.

Email Etiquette:
Guidelines to Effective Emails Handout

3 Hrs.
Instructors ask participants to recall a presentation they had a few months prior where they discussed collaborating across generations. Instructors facilitate discussion around how different generations communicate and the impact this may have on working in virtual teams.

**Effective Communication Skills**

Instructors revisit examples of good and bad communication participants identified at the beginning of the module and introduce strategies to effective communication:

- **Email etiquette** – email is one of the biggest sources of conflict in the workplace. Instructors mention characteristics of good (good subject line, specific, clear requests, etc.) vs. bad emails (using caps, exclamation points, etc.). Introduce the rule of 3.
- **Active listening and Summarizing** – instructors use *It’s Not About the Nail* video and debrief by asking participants what they notice and what the definition of active listening is. Instructors summarize the definition and provide participants with tips on how to listen effectively such as taking notes, watching their body language, etc.

▶ Activity 1: Instructors split participants in 3 groups and provide each group with different instructions. Group 1 – Speakers will share an experience with their partner. Group 2 – Listeners will listen without responding and raise their hand for 3 seconds anytime they wish to interject, their thoughts stray, they miss something their partner has said. Group 3 – Observers (online participants) will monitor interactions – body language in particular and reactions. Debrief:
  - Observers, what did you notice?
  - Speakers, what happened?
  - Listeners, please share the instructions you received with your partners. Now summarize to your partner what you heard. How much did you capture? What did you miss?
  - In light of the video and this activity, what is the point we’re trying to make?
  - What if you were to have this conversation over VTC or Conference Call?

▶ Activity 2: Participants are grouped in pairs. Person A will go first and share an experience related to technology and working with others. Person B will listen and summarize. Person A will provide person B with feedback on whether they felt listened or not and if the summary was adequate. Participants switch roles and repeat the activity. Debrief:
  - Speakers, what did the listener do to make you feel heard?
  - Listeners, what challenges did you encounter?
For those who partnered with someone joining us online, what was your experience? How did you make the other feel heard? What challenges did you encounter?

To the group, what additional challenges might arise when in a virtual environment?

- Summarizing – instructors define summarizing and provide examples.
- Asking Questions – Participants are instructed to listen to the story told by instructors. Instructors tell the following story: A man walks into a bar and goes up to the bartender. The bartender pulls out a gun and points it at the man. The man says “Thank You” and walks out. Participants are asked to ask questions of the instructor to determine why the man said thank you. Debrief:
  - What different types of questions did you hear?
  - Which were the most effective?
  - Instructors summarize the different types of questions and when they are appropriate.
  - Review of Powerful Questions Handout in the participant guide.
- Instructors introduce communication patterns that interfere with connection and communication that opens or closes dialogue.
- Instructors break participants into groups of 3-4 and task each group to analyze the case study provided.

**Facilitating Virtual Team Meetings**

Instructors remind participants that 80% of the key to success is preparation and planning. They open up this section by asking participants to provide examples of what makes meetings go well and what does not. Expected responses include having an agenda, staying on task, being able to participate.

Instructors explain the importance of creating an agenda – enhances trust, shows respect for people’s time, ensures all team members are prepared and ready to participate. Instructors explore best practices in creating an agenda such as it and any other reading material should be sent to the team at least 2-3 days ahead of the meeting to allow for time to send in additional items and finalize last minute preparations.

Instructors present strategies to facilitate meetings once they start. The meeting facilitator could use a Participant Map to keep track of participation. As the map fills out, it allows the facilitator to notice whether one or more people are dominating the conversation, who is has not participated at all and to make adjustments as necessary. Instructors will introduce DeBono’s 6 Hats model as another tool to manage conversation and keep focus.
Instructors present strategies on dealing with difficult team members by understanding their concerns, providing feedback, using group norms, and refocusing attention.

Participants are given 2 scenarios to discuss in small groups to identify the following:
- Barriers to communication
- Strategies to overcome the barriers identified and build trust and rapport

Participants are asked to complete a survey analyzing how their teams worked together during the case study activities.

### MODULE 4. MANAGING AND RESOLVING CONFLICT

- **Identify** warning signs that indicate the potential for conflict
- **Determine** the sources of conflict in the provided case study and select the appropriate response that will resolve the conflict
- **Assess** the benefits and disadvantages of each style of conflict and the impact dynamics

#### Warning Signs
Instructors ask participants to consider based on past experience and the situation identified at the beginning of the course when did they know things in their virtual team were not going well. Predicted responses include signs of withdrawal, frustration, sarcasm, lack of participation, constant interruption, etc.

#### Sources of Conflict
Instructors identify perception as a major source of conflict. They start by telling the following story:

**Instructor A is from Virginia**, while **Instructor B is originally from Canada**. Instructor A states: *It’s 20 degrees, it is freezing outside!* Instructor B disagrees: *It is just mildly cold.* Instructors ask participants who is right. Debrief: Instructors assist participants in defining what is a fact and what is a story. A fact is measurable and evidence based – i.e. The temperature is 20 degrees. A story is our perception of the situation and is not a fact – i.e. It is 20 degrees, it is cold out – it depends where you come from, how used to the cold you are, what measurement unit you use (F vs. C).

To further explain how perception influences our behavior, communication, decision-making and conflict management, instructors introduce the Ladder of Inference and the Judger/Learner Mindset. The Ladder of Inference details the steps our brain takes, in a very short period of time, to make decisions and act on the information it takes in. The process is informed by our past experiences, view of the world, relationship with other people. The Judger/Learner Mindset details the importance of remaining curious and not making assumptions.

Instructors define the other sources of conflict - data, values, relationships, structural, resources, goals – and identify strategies to overcome each source of conflict. Instructors facilitate discussion of when technology becomes a source of conflict and what strategies would help address it – i.e. building in multiple communication channels.

| Flip chart, markers, tape to record group norms and post where visible by all |
| Instructor PowerPoint |
| Participant Handout with PowerPoint information, handouts, and activities |
| Ladder of Inference Handout |
| Judger/Learner Mindset Handout |
| Sources of Conflict and Strategies to Overcome Them Handout |
| Thomas Killmann Conflict Style Inventory Handout |
Participants are asked to return to their last experience in a virtual team if it included a confrontation or just their last confrontation and do the following:

- **Explain** perception as a source of conflict
- **Analyze** the usefulness of the Ladder of Inference and Learner/Judger Mindset in addressing conflict
- **Demonstrate** effective conflict resolution skills and determine appropriate strategies to resolve the conflict in the provided case study

<table>
<thead>
<tr>
<th>Participants are asked to return to their last experience in a virtual team if it included a confrontation or just their last confrontation and do the following:</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Divide a page in two halves, left and right.</td>
</tr>
<tr>
<td>- In the right column, write the scrip of their last confrontation – word for word who said what, like the dialogue in a play.</td>
</tr>
<tr>
<td>- In the left column, write what were they thinking, feeling, how was their body reacting to the situation.</td>
</tr>
<tr>
<td>- Once the columns are filled, participants are asked to reflect using the Sources of Conflict, Ladder of Inference or the Learner/Judger Mindset to identify:</td>
</tr>
<tr>
<td>- What were the sources of conflict?</td>
</tr>
<tr>
<td>- What behaviors escalated the conflict?</td>
</tr>
<tr>
<td>- What assumptions were made?</td>
</tr>
<tr>
<td>- What mindset were they in?</td>
</tr>
<tr>
<td>- What opportunities to de-escalate were missed?</td>
</tr>
<tr>
<td>- How did their thoughts and feelings influence their behavior and communication?</td>
</tr>
<tr>
<td>- Big group debrief gives participants the opportunity to share and receive feedback.</td>
</tr>
</tbody>
</table>

**Conflict Styles**

Instructors note that each person engages in conflict differently, that we all have a conflict style. Participants are asked to complete the Thomas Killmann Inventory to determine their conflict style. What do they think of the results? Are they surprised by any of it? Poll how many participants got as their highest avoid, compete, collaborate, compromise or accommodate. What initial perceptions do they have about each style?

Instructors identify each style’s characteristics, pros and cons, and appropriateness depending on the situation. Participants are then asked to analyze how do they think someone with a style of compete might interact with someone whose style is avoid? What dynamics might play out? How is this important when resolving conflict?

**Skills**

Instructors identify strategies to manage and resolve conflict:

- Separate the people from the problem – it is important to not make things personal and not result to personal attacks. Keep the focus on understanding the problem.
Avoiding the Team Member Face-Off

- Create a mutual problem solving statement when possible – most often than not, people have the same goal but go about approaching it in different ways. In this case, completing the task the team was assigned. One strategy is thinking in terms of AND not OR. If one person wants X and the other person wants Y, how can X get what they want and Y get what they want? Another strategy could be asking how can we achieve our goal and avoid what we don’t want to happen? It helps expand the pie rather than narrowing it. Instructors present a few dialogue scenarios and ask participants to develop a mutual problem-solving statement.

- Refocus – when the team is stuck, a good strategy is to remind everyone of the accomplishments achieved thus far, what the end goal is and of the group norms the group agreed to follow.

- Use effective communication skills identified in the previous chapter – active listening to understand, summarizing and asking questions to clarify, etc.

- Speak from your own perspective – do not blame others and make demands. Share your view of the situation, what you need, and make reasonable requests that would solve the situation.

Participants are divided in pairs and asked to act out what they would do to resolve the conflict in the provided scenario based on the skills discussed. Debrief questions:

- What skills did you use?
- How were they effective, ineffective?
- What would you do differently?
- What was most challenging?

**CLOSING SESSION**

Participants are asked to choose 3 skills/tools they will commit to practicing as they move forward and share the skills with the class and a partner. Instructors encourage participants to check-in with their partner over time and support each other in practicing the skills identified.

Instructors call out for any last questions and share additional resource for participants to use. Participants complete Level 1 evaluation forms while instructors hand out certificates.
INSTRUCTIONAL MATERIALS

PowerPoint Presentation and Instructor Notes

Please see Appendix A on page 30.

Participant Handout

Please see Appendix B on page 38.

EVALUATION

The following section describes our evaluation and assessment approaches.

Formative

The agency ombudsman and SMEs worked close together with the designers throughout the formative evaluation process by reviewing the training design at each step, starting with the task analysis, instructional objectives, instructional strategies and evaluation. Changes to each element were made based on their feedback that reflected the following:

- Are the instructional objectives clear and realistic?
- Given the instructional objectives set out is the level of learning reached within the time allotted for the training acceptable?
- Are the instructional objectives and the content in line with the concerns leadership wants this training to address?
- Are the instructional strategies appropriate and possible given the technology to be used in the training delivery?
- Are supporting materials appropriate and useful to the participants learning?
- Is anything missing?
- What revisions seem necessary?
- What challenges do you identify given the objectives to be fulfilled, the instructional strategies to be used, technology, and the timeframe the training is to be delivered in?

Challenge to formative evaluation: Inability to request feedback of all those interviewed in the learner analysis portion of the project.

Assessment Plan

Learners will be assessed in the form of Q&A sessions during each module. The learners will be asked questions about what has been discussed, and to share their thoughts. Observers will be tasked with tracking the following throughout activities:

- What worked well? Be specific by referring to behaviors, words, body language, etc.
- What seemed to be challenging/difficult?
- What would they have done differently?
Since the training will be provided multiple times, feedback from participants both throughout the session will be documented, and modifications will be implemented for the next round of training based on inputs from SMEs and the agency’s ombudsman.

**Summative**

The summative evaluation will consist the following anonymous evaluation and the summative assessments conducted throughout the training.

<table>
<thead>
<tr>
<th>INSTRUCTORS</th>
<th>STRONGLY AGREE</th>
<th>AGREE</th>
<th>UNCERTAIN</th>
<th>DISAGREE</th>
<th>STRONGLY DISAGREE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Presented materials clearly and effectively</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Encouraged participation</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Responded to questions satisfactorily</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Used available time effectively</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Were helpful during exercises</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Were well prepared and knowledgeable</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>WORKSHOP</th>
<th>STRONGLY AGREE</th>
<th>AGREE</th>
<th>UNCERTAIN</th>
<th>DISAGREE</th>
<th>STRONGLY DISAGREE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Was well organized</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Length was appropriate</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Materials were relevant and supportive</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Objectives were met</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Met my needs and expectations</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I will use what I learned</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Activities were relevant</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Materials were clearly visible</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Video was satisfactory</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Audio was satisfactory</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Instructor and others could be heard</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>YOUR KNOWLEDGE/SKILL LEVEL OF THE SUBJECT MATTER:</th>
<th>0 (NONE)</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5 (EXPERT)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Knowledge of the team life cycle and team dynamics</td>
<td>Before</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>After</td>
</tr>
<tr>
<td>Behaviors that create and break trust and rapport</td>
<td>Before</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>After</td>
</tr>
<tr>
<td>The benefits of creating a team charter and how to</td>
<td>Before</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>After</td>
</tr>
<tr>
<td>structure one</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Range of communication channels and their</td>
<td>Before</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>After</td>
</tr>
<tr>
<td>appropriateness</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Behaviors that demonstrate effective communication</td>
<td>Before</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>After</td>
</tr>
<tr>
<td>Managing and resolving conflict within the virtual</td>
<td>Before</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>After</td>
</tr>
<tr>
<td>environment</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

What did you find particularly useful (information, tools, activities) in this training?
What could have made this training better?

At the end course, evaluation used for the summative evaluation will dictate additional changes to improve training effectiveness for following sessions. The agency's ombudsman and SMEs will be consulted with regard to any changes that seem to be necessary.

Assessment Plan

Learners will be assessed in the form of Q&A or surveys at the end of each module. The learners will be asked to do the following:

- **Module I**
  - Share their reflection and correctly identify where their virtual team was in the life cycle.

- **Module II**
  - Activity groups will be presented with a case study. The groups will be assessed on their ability to identify and analyze the sources of distrust and apply the appropriate actions to resolve the problem.
  - Each group will be evaluated on their ability to develop group norms based on a given case study.
  - Group leaders will present on behalf their groups responses and justification. Group leaders will be provided with feedback on their leadership skills by their peers and the instructors. Feedback questions will include:
    - Did your group leader set clear expectations?
    - How did your group leader manage communication?
    - What would you have done differently if you were the group leader?

- **Module III**
  - Activity groups will be assigned a type of communication method (phone and email), and participants in the group will simulated a virtual working environment. While working together in the virtual environment, the groups will be assessed on responding appropriately to events listed in the predefined scenarios. Assessment rubrics will include:
    - Participants ensured everyone had a chance to voice their opinion.
    - Group norms were respected.
    - Participants maintained open dialogue.

- **Module IV**
  - Activity group will be presented with a case study. Each group will identify the warning signs, the sources of conflict, select the best conflict style to use and explain how the conflict could be resolve effectively.

Confirmative

The confirmative evaluation (Level 3 of the Kirkpatrick model) will consist of:
• Interviewing the agency ombudsman to determine whether there has been a change in the frequency of reported conflicts in virtual teams and level of performance improvement.

• Participants complete the following survey prior to the training and then again, 3 months after the training. The decision of choosing a self-reported survey instead of observation is based on the following:
  o The agency cannot allow designers access to the employees in order to conduct observations.
  o The survey is the least intrusive and time consuming method of reaching the participants.

Survey

For each of the following statements, rate your level of agreement or disagreement: 1=disagree, 2=undecided, 3=agree.

• I clearly understand the goals and purpose of my team.
• I understand my role on this team and the role of my fellow team members.
• I am able to openly disagree with another team member’s idea in order to find a better solution.
• I am able to openly debate with another team member about an idea I have submitted.
• I clearly understand the meeting rules and guidelines our team has developed to govern how we work together.
• Our team members regularly follow the meeting rules and guidelines we have set forth.
• Our team is able to successfully complete tasks we have been assigned.
• I am able to ask for help when I am in danger of failing on an assignment.
• Team members hold each other accountable at least 75% of the time.
• Our team takes time to celebrate successes and recognize the contribution of members at the completion of a project.
• Our team is able to successfully orient new team members and continue performing at a high level with little interruption.

Additional questions to be included on the 3-month post-training evaluation:

• What knowledge/skills/tools have made the biggest difference in your team’s performance?
• What challenges have you encountered in applying the knowledge/skills/tools acquired in the training?
• What additional knowledge/skill/tools do you still need?
• Additional comments you would like to make?

REFERENCES


### APPENDIX A - PowerPoint Presentation and Instructor Notes

#### SLIDE

- **Avoiding the Team Member Face-Off**
- *Module 3: Communicating for Results*

#### INSTRUCTOR NOTES

**Instructor:** Welcome back from break. As many of you identified this morning, communication can be a major challenge to performance in virtual teams.

**Instructor:** Our goal for this module is to examine all aspects of communication that impact how you work within your virtual team – approaches, the impact of technology, skills. The learning objectives we will be completing are...

#### Learning Objectives

- Assess the appropriateness of each communication type and meeting environment, determine the best option and argue your selection for the case study provided
- Develop strategies to break down communication barriers
- Apply effective communication skills to build trust and develop more collaborative working relationships
- Analyze communication strategies and select the best approach to achieve desired results
Instructor: Before we dive into the topic of communication, please turn to page 1 in your Participant Handout and take the next 5 minutes to complete Reflection Activity C1.

Participants complete activity... What did you notice about communication? Instructor facilitates discussion, then summarizes key points. There are ways we all communicate with each other: verbal – words and sounds, also written, non-verbal – body language, posture, facial expressions, gestures, and para-verbal – tone, pitch and pace of our voice. If you were to assign percentages to identify how much of our communication falls in which category, what would the numbers be? Participant throw out questions... Instructor reveals slide: The is some debate as to how accurate these numbers are, however one consistency across all research done is that we communicate non-verbally more than we do verbally. Do you think this is accurate? Does that mean that one way of communicating is more important and should be paid closed attention to? What are examples of good and bad communication in each category? Instructor records on flip chart. What role does technology play?

<table>
<thead>
<tr>
<th>HOW WE COMMUNICATE</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Verbal (7%)</strong></td>
</tr>
<tr>
<td>Using sounds and words</td>
</tr>
<tr>
<td><strong>Para-Verbal (31%)</strong></td>
</tr>
<tr>
<td>Tone, pitch, pace</td>
</tr>
<tr>
<td><strong>Non-Verbal (62%)</strong></td>
</tr>
<tr>
<td>Facial expressions, gestures</td>
</tr>
</tbody>
</table>

Instructor: Take the next 5 minutes to work in your groups and complete small group activity C2 on page 2 of your Participant Handout.

Now that all groups are finished I would like a volunteer for each group to present your findings. Who would like to begin? Each group reports out. Great answers everyone. To summarize... Instructor goes over the slide and summarizes discussion.

<table>
<thead>
<tr>
<th>Video Teleconference (VTC)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Benefits: non-verbal, verbal and para-verbal observable, supports building trust and rapport, most engaging</td>
</tr>
<tr>
<td>Downsides: lag, requires advanced tech, many moving parts, may require training on the tech, high cost</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Conference Call</th>
</tr>
</thead>
<tbody>
<tr>
<td>Benefits: verbal and para-verbal observable, accessible on various devices, low tech, low cost</td>
</tr>
<tr>
<td>Downsides: difficult to facilitate, participants less engaged</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Asynchronous (Email, IM, text, etc.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Benefits: only verbal (written) observable, accessible on any device, low tech, quick, low cost</td>
</tr>
<tr>
<td>Downsides: no non-verbal or para-verbal cues, not in real time, participants can avoid and less engaged</td>
</tr>
</tbody>
</table>
Instructor: I want you to think back to the presentation you had a few months ago on Collaborating Across Generations. Instructor introduces slide and highlights key characteristics for each generation. What do you recall discussing in terms of communication styles? Is this important when talking about communicating effectively in virtual teams? Why or why not? Instructor facilitates discussion and summarizes key points.

Instructor: Here is some additional data about how people communicate. What do you notice? What implications might this information have when deciding how to communicate (group norms/team charter)?

Source: *What’s the big deal with Facebook?* Abacus Data, January 2011
Avoiding the Team Member Face-Off

**Instructor**: One of the major sources of conflict is email. Think back to your experience with email. Is this statement accurate? Why or why not? Can you give an example?

**Instructor** facilitates discussion and assists students in coming up with best practices around email etiquette. **Instructor introduces the Rule of 3**: One rule that has always worked for me is what I call the Rule of 3. If it takes more than 3 emails between us, I pick up the phone and give you a call because we’re obviously talking across each other. This has helped clear up a lot of miscommunications and avoid escalating conflicts.

---

**EMAIL ETIQUETTE**

- Considerations
  - Writing and sending emails
  - To, From, CC, BCC, RR, Subject
- Other
- Rule of 3

---

**ACTIVE LISTENING**

**Instructor**: If anyone has seen this before, please do not reveal any details to your colleagues.

...**Participants watch video...** **Instructor**: What did you notice? Based on this video, what is the definition of active listening? What does it look like? **Instructor** facilitates discussion.

**Activity**: Please count off 1, 2, 1, 2, etc. Those of you tuning in online will be observers. Group 1, please step into the hallway and away your instructions.

**Instructions for Group 1**: You will share with your partner an experience related working with others. You have 1 minute to talk. Please wait to be called in.

**Instructions for Group 2**: Your partner will share an experience with you. Your task is to listen actively. Every time your thoughts stray to another subject, want to interject, or zone out and miss what your partner has said, I want you to raise your hand for 3 seconds. You are not allowed to say anything to your partner.

**Instructions for Observers (online participants)**: Your task is to monitor the interactions between partners. Notice body language, verbal and para-verbal communication. You will share your observations at the end of the exercise.

**Instructor** calls Group 1 back in the room and starts the exercise. Typically, the speaker gets flustered and side tracked seeing their partner raise their hands and not answering their questions. Some speakers get frustrated and stop talking all together. Most listeners crack up and end up holding their hands up the entire time.
**ACTIVE LISTENING**

- Listening and responding to increase mutual understanding
- Summarizing – Capturing key ideas

---

**Debrief:**
- Observers, what did you notice?
- Speakers, what happened?
- Listeners, please share the instructions you received with your partners. Now summarize to your partner what you heard. How much did you capture? What did you miss?
- In light of the video and this activity, what is the point we’re trying to make?
- What if you were to have this conversation over VTC or Conference Call?

---

**Instructor:** Now that we have discussed active listening it is time to practice. Please find a partner. Decide who is person A and who is person B. Person A will share an experience related to using technology to collaborate. Person B will listen and summarize to person A’s satisfaction. I will call switch. At this point, reverse roles and repeat.

**Debrief:**
- Speakers, what did the listener do to make you feel heard?
- Listeners, what challenges did you encounter?
- For those who partnered with someone joining us online, what was your experience? How did you make the other feel heard? What challenges did you encounter?
- To the group, what additional challenges might arise when in a virtual environment?
Instructor: I will now tell you a story. Your task is to practice active listening. At the end of the story, you will have the opportunity to ask questions.

The story: A man walks into a bar. He walks up to the bar. The bartender pulls out a gun and points it towards the man. The man says "Thank you" and walks out. Why did the man say “Thank you?”

Instructor instructions: Only answer the question. Do not volunteer additional information.

Participant instructions: What do you think happened?

Typically, participants will ask closed questions. Instructor should allow the questioning to go on for 3-5 minutes.

Debrief Questions

If participants don’t guess the answer:
• Why do you think you didn’t find out why the man said “Thank you?”
• Did anyone notice anything about the group’s questions?

The answer to the question: The man had the hiccups. Instructor introduces types of questions and facilitates discussion around when each type is appropriate or not.

If participants guess the answer:
• What led you to find out why the man said “Thank you”?
• What did you notice about the group’s questions?
• Can you pinpoint your breakthrough?

Instructor introduces types of questions and facilitates discussion around when each type is appropriate or not.

Instructor introduces Powerful Questions handout on page 6 of the participant handout.
**Avoiding the Team Member Face-Off**

Instructor: We’ve talked a lot about communication. Now, how do you think communication relates to the way we connect with others? Can anyone think of any examples? *Instructor facilitates then introduces slide and page 7 in the participant handout.*

<table>
<thead>
<tr>
<th>COMMUNICATION PATTERNS THAT <strong>INTERFERE</strong> WITH CONNECTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Advising</td>
</tr>
<tr>
<td>• Blaming</td>
</tr>
<tr>
<td>• Commiserating</td>
</tr>
<tr>
<td>• Comparing</td>
</tr>
<tr>
<td>• Consoling</td>
</tr>
<tr>
<td>• Correcting</td>
</tr>
<tr>
<td>• Demanding</td>
</tr>
<tr>
<td>• Denying</td>
</tr>
<tr>
<td>• Diagnosing</td>
</tr>
<tr>
<td>• Educating</td>
</tr>
<tr>
<td>• Explaining</td>
</tr>
<tr>
<td>• Incentivizing</td>
</tr>
<tr>
<td>• Interrogating</td>
</tr>
<tr>
<td>• Judging</td>
</tr>
<tr>
<td>• One-upping</td>
</tr>
<tr>
<td>• Shutting down</td>
</tr>
<tr>
<td>• Story-telling</td>
</tr>
<tr>
<td>• Victimizing</td>
</tr>
</tbody>
</table>

Instructor: Dialogue is important because it leads to problem-solving. Just as not all communication allows us to connect with others, not all communication keeps the dialogue open. *Instructor covers communication patterns that open or close dialogue and introduces page 8 in the participant handbook.*

<table>
<thead>
<tr>
<th>COMMUNICATION THAT <strong>OPENS</strong> OR <strong>CLOSES</strong> DIALOGUE</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Effective and Open</strong></td>
</tr>
<tr>
<td>• Tell me more, I want to understand where you are</td>
</tr>
<tr>
<td>coming from.</td>
</tr>
<tr>
<td>• I am understanding you to say is that right? Is that</td>
</tr>
<tr>
<td>how you want to be understood?</td>
</tr>
<tr>
<td>• Would you be willing to <em>?</em> (clear action request,</td>
</tr>
<tr>
<td>not demand)</td>
</tr>
<tr>
<td><strong>Ineffective and Closed</strong></td>
</tr>
<tr>
<td>• You don’t know what you’re talking about.</td>
</tr>
<tr>
<td>• You never listen.</td>
</tr>
<tr>
<td>• Here’s what you did wrong.</td>
</tr>
<tr>
<td>• Why did you do that?</td>
</tr>
<tr>
<td>• You always / you never</td>
</tr>
<tr>
<td>• You’re being ____________________</td>
</tr>
</tbody>
</table>
Instructor divides participants into groups of 3-4. Each team receives chart paper to record their answers. Online participants are assigned in groups of 3 with other online participants. Each online group meets in a virtual breakout room. They will share their screen when reporting out. (30 minutes)

Debrief: Instructor goes around the room and asks each team to share their answers.

Not included in this prototype is the last section of Module 3: Facilitating Meetings. Once that section is complete, the instructor will ask participants to complete survey on page 10 in their handout.
APPENDIX B - Participant Handout

HOW WE COMMUNICATE

Reflection Activity C1

Answer the survey questions below. Upon completion, review your answers and the situation you identified at the beginning of the course.

Survey

- Team members respect group norms and when they are unclear about what’s okay and not okay, they ask for clarification.
  5=always, 4=often, 3=sometimes, 2=rarely, 1=never

- Team members communicated clearly.
  5=always, 4=often, 3=sometimes, 2=rarely, 1=never

- Team members understood the decision-making process.
  5=always, 4=often, 3=sometimes, 2=rarely, 1=never

- Team members were involved in the decision-making process.
  5=always, 4=often, 3=sometimes, 2=rarely, 1=never

- Team members owned their mistakes, apologized, and made amends. They do not blame each other for their mistakes and hold each other accountable with honesty and respect.
  5=always, 4=often, 3=sometimes, 2=rarely, 1=never

- Team members do what they say they do. They are aware of their competencies and limitations. They do not over promise and are able to deliver on commitments and balance competing priorities.
  5=always, 4=often, 3=sometimes, 2=rarely, 1=never

- Based on their answers to the questions above, how much did team members trust each other? What were missed opportunities to increase trust and rapport? Share as a big group.

What do you notice about communication?

_______________________________________________________________________________________________________

_______________________________________________________________________________________________________

_______________________________________________________________________________________________________

_______________________________________________________________________________________________________

_______________________________________________________________________________________________________
MEETING ENVIRONMENTS

Types:

- Video Teleconferencing (VTC)
- Conference Call
- Asynchronous (Email, IM, text, etc.)

Small Group Activity C2

Work in groups of 3-4 to analyze the benefits and downsides of your assigned meeting environment type. Discuss how your meeting environment impacts communication and what are the technology requirements. Lastly, as a team, rank each meeting time in order you would prefer to use them. What is your reasoning behind your choice?

<table>
<thead>
<tr>
<th>Meeting Environment</th>
<th>Benefits</th>
<th>Downsides</th>
<th>Technology requirements</th>
<th>Order of preference</th>
</tr>
</thead>
<tbody>
<tr>
<td>VTC</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Conference Call</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Asynchronous</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Communication preferences across generations

**Traditionalists**
- Face-to-face
- Stiff
- Formal
- Abundant description

**Boomers**
- Face-to-face ideally, required
- Telephone or email if required
- Formal

**Gen Xs**
- Online – would prefer face-to-face if time permits
- Text messaging, email
- Informal
- Bullet Points
- Concise

**Millennials**
- Online (Facetime, Google Hangouts)
- Casual
- Text/IM
- Shorthand

Notes:
EMAIL ETIQUETTE

- Considerations
- Rule of 3

Best Practices

- Read your email out loud or have someone review it to ensure the tone is what you intend it to be.
- Include all relevant details or information necessary to understand your request of point of view.
- If your email is emotionally charged, don’t reply immediately – walk away and come back to it.
- Be careful with “Reply All”. Use it when appropriate.
- Caution using ALL CAPS, red font and !!! exclamation marks.

What best practices would you need to discuss with your team when creating group norms/team charter?

ACTIVE LISTENING

- Active listening: a way of listening and responding to increase mutual understanding
- Summarizing: capturing key ideas

Notes:
____________________________________________________________________
____________________________________________________________________
____________________________________________________________________
____________________________________________________________________
____________________________________________________________________

QUESTIONS

Types:
- Closed – yes/no
Avoiding the Team Member Face-Off

- Appropriate:
  - ________________
  - ________________
  - ________________
  - ________________
  - ________________

- Not appropriate:
  - ________________
  - ________________
  - ________________
  - ________________
  - ________________

- Open – require more than one word

  - Appropriate:
    - ________________
    - ________________
    - ________________
    - ________________
    - ________________

  - Not appropriate:
    - ________________
    - ________________
    - ________________
    - ________________
    - ________________

*Powerful questions – require deep thought and cause a shift in thinking.*
POWERSFUL QUESTIONS (Whitworth, Et. Al)

Powerful questions are provocative queries that put a halt to evasion and confusion. By asking powerful questions, you invite others to clarity, action, and discovery at a whole new level. As you can see from the following examples, these are generally open-ended questions that create greater possibility for expanding learning and fresh perspective.

<table>
<thead>
<tr>
<th>Anticipation</th>
<th>Implementation</th>
</tr>
</thead>
<tbody>
<tr>
<td>What might happen?</td>
<td>What is the action plan?</td>
</tr>
<tr>
<td>What if it doesn't work out the way you wish?</td>
<td>What will you have to do to get the job done?</td>
</tr>
<tr>
<td>What if that doesn't work?</td>
<td>What support do you need to accomplish.....?</td>
</tr>
<tr>
<td>And if that fails, what will you do?</td>
<td>What will you do? When will you do it?</td>
</tr>
<tr>
<td>What is your back up plan?</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Assessment</th>
<th>Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>What do you make of it?</td>
<td>What are the possibilities?</td>
</tr>
<tr>
<td>What do you think is best?</td>
<td>If you had your choice, what would you do?</td>
</tr>
<tr>
<td>How does it look to you?</td>
<td>What are the possible solutions?</td>
</tr>
<tr>
<td>How do you feel about it?</td>
<td>What if you do and what if you don't?</td>
</tr>
<tr>
<td>What if it doesn't work?</td>
<td>What options can you create?</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Clarification</th>
<th>Outcomes</th>
</tr>
</thead>
<tbody>
<tr>
<td>What do you mean?</td>
<td>What do you want?</td>
</tr>
<tr>
<td>What does it feel like?</td>
<td>What is your desired outcome?</td>
</tr>
<tr>
<td>What seems to confuse you?</td>
<td>If you got it, what would you have?</td>
</tr>
<tr>
<td>What do you want?</td>
<td>How will you know you have reached it?</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Evaluation</th>
<th>Planning</th>
</tr>
</thead>
<tbody>
<tr>
<td>In what way?</td>
<td>What do you plan to do about it?</td>
</tr>
<tr>
<td>How does this fit with your/our plans/values?</td>
<td>What is your game plan?</td>
</tr>
<tr>
<td>What do you think that means?</td>
<td>What kind of plan do you need to create?</td>
</tr>
<tr>
<td>What is your assessment?</td>
<td>How do you suppose you could improve the situation?</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Exploration</th>
<th>Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td>What other angles can you think of?</td>
<td>What is your conclusion?</td>
</tr>
<tr>
<td>What is another possibility?</td>
<td></td>
</tr>
</tbody>
</table>
What are your other options?

**Example**

Will you give an example?

For instance?

Like what?

Such as?

What would it look like?

**Elaboration**

Will you elaborate?

Will you tell me more about it?

What else?

Is there more?

How is this working?

**Taking Action**

How would you describe this?

What do you think this all amounts to?

How would summarize the efforts so far?

What action will you take? And after that?

What will you do? When?

Is this a time for action? What action?

Where do you go from here? When will you do that?

What are your next steps? By when?

COMMUNICATION PATTERNS THAT INTERFERE WITH CONNECTION

- **Advising:** "I think you should..." "How come you didn't...?"

- **Blaming:** "You should have known better; look at the mess you've made."

- **Commiserating:** "Oh, you poor thing."

- **Comparing:** "If you were just more like ..."

- **Consoling:** "You poor thing; you did the best you could."

- **Correcting:** "That's not how it happened."

- **Demanding:** "You must...you have to...you need to..."

- **Denying:** "You really had no choice." "You really leave me no choice."

- **Diagnosing:** "It sounds like you have ADD." "He's really a stupid idiot."

- **Educating:** "This could turn into a very positive experience for you if you just..."

- **Explaining:** "I would have called but..."

- **Incentivizing:** "If you do this, you will get rewarded (or punished)."

- **Interrogating:** "When did this begin?"

- **Judging:** "That's a bad thing for you to do."

- **One-Upping:** "That's nothing; wait till you hear what happened to me."
• **Shutting down:** "Cheer up. Get over it. It’s time to move on."

• **Story-telling:** “That reminds me of the time...”

• **Victimizing:** “It’s not your fault; there’s nothing else you could have done.”

**COMMUNICATION THAT OPENS OR CLOSES DIALOGUE**

<table>
<thead>
<tr>
<th>EFFECTIVE &amp; OPEN</th>
<th>INEFFECTIVE &amp; CLOSED</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Tell me more, I want to understand where you are coming from.</td>
<td>• You don’t know what you’re talking about.</td>
</tr>
<tr>
<td>• I’m understanding you to say _is that right? Is that how you want to be understood?</td>
<td>• I don’t want to hear another word.</td>
</tr>
<tr>
<td>• I feel mad frustrated, confused, scared, sad (any emotion)</td>
<td>• You make me feel____</td>
</tr>
<tr>
<td>• I’ve noticed that_____ (state the facts/observations)</td>
<td>• You’re being____</td>
</tr>
<tr>
<td>• Would you be willing to _____? (clear action request)</td>
<td>• You always/never____</td>
</tr>
<tr>
<td>• I have some suggestions if you would like to hear them.</td>
<td>• You should</td>
</tr>
<tr>
<td>• Please hear me out for 5 minutes about how I’m feeling (about myself in this situation), and then would you tell me how you feel?</td>
<td>• You shouldn’t ____</td>
</tr>
<tr>
<td>• I’d like to hear about your day.</td>
<td>• Why don’t you listen for a change?</td>
</tr>
<tr>
<td></td>
<td>• You never listen</td>
</tr>
<tr>
<td></td>
<td>• Never mind.</td>
</tr>
<tr>
<td></td>
<td>• Here’s what you did wrong.</td>
</tr>
<tr>
<td></td>
<td>• Where were you? What did you do that for? What did you do? What were you thinking? Why did you do that?</td>
</tr>
</tbody>
</table>
CASE STUDY

Review the following scenario in your group and identify:

- Communication barriers.
- Strategies to overcome the communication barriers.
- What would you do?

Background information: **What is Scrum?** Scrum is a management and control process that cuts through complexity to focus on building software that meets business needs. Scrum itself is a simple framework for effective team collaboration on complex software projects.

**Client:** BB Technologies, Inc.

**Project:** Website Branding

**Outcome:** Team Collaboration and Communication

BB Technologies, Inc. has organized a scrum team to redesign their corporate website. The team consists of 5 engineers: a graphic designer, a database developer, and 3 web developers. Two team members are working remotely. Since this is a newly formed team, they decided to start reviewing the requirements of the project, and determine who would be the best fit for the different sections of the project. Everyone was motivated and excited to get started on the project, and deliver an amazing new design.

Two weeks later, the climate of the group had drastically changed. The team members were not following the daily scrum commitments, the sprint reviews did not deliver what was promised, and it appeared that the team members were not getting along. The project manager was worried that the team would not be able to deliver the new design according to the schedule, and therefore decided to meet with the team to determine what had happened.

**Responses and Feedback**

**Graphic Designer:** During the weekly VTC, we discussed the new design, and I was tasked to design the prototype. Based on my knowledge of the industry, I chose a design and layout that I felt would be best. When I presented it to the team, they were not receptive to the new design mockup, and I felt that they did not respect my professional expertise.

**Database Developer:** I have been assigned to this project, but I am not a web designer. I do not feel like I can contribute to the success of the project. No one has taken the time to work with or assign me any meaningful tasks. Why am I even on this team?

**Web Developer 1:** We have a tight deadline, and I do not have time to teach anyone how to develop website. That’s not my job!

**Web Developer 2:** I am trying to make sure that everyone understands the customer’s requirements, and work together as a team, but it is challenging when some team member do not want to share their knowledge so that everyone can benefit. I am not the team leader so it is difficult manage the team. I think we need to make some changes in the team to help us communicate and work more cohesively.

**Web Developer 3:** I agree with everything “Developer 2” says.
SURVEY

How effectively did you team work together?

☐ Poorly  ☐ Well
☐ Adequately  ☐ Extremely well

What percentage of your team participated actively?

Share one specific example of something you learned from the group exercise.

Share one specific example of something you learned from a team member.

Suggest at least one change the team could make to improve performance.